Michigan Treasury Online (MTO) Optimization

Learning Series 3: Selecting a User Role

NOTE: These documents are for demonstration purposes only and are not actual accounts or taxpayers.

January 2016

Customer Friendly

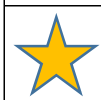
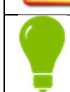
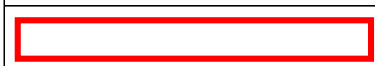
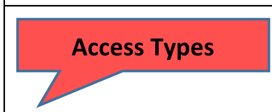
Simplified Process

What's New in MTO?

- **How to Select a User Role**

Learning Series 3: Selecting a User Role (Access Type)

Before continuing, please spend a few minutes becoming familiar with the images used in this Learning Series:

Image	Purpose
	To indicate a change in process or functionally that is expected to significantly increase the user experience
	To indicate a reminder or a relevant note within a text
	To indicate a quick tip or faster way of completing an action
	To number steps on screenshots
	To highlight any part of the screenshot, such as a button
	To draw attention to a relevant section of information/text (not a button)

Old Process	New Process (Effective January 2016)
• Only the business owner can enter into MBOS and give/delegate account access to a 3rd party user (such as a CPA, an Association member, etc.) • As part of the delegation process, the user seeking access will wait up to several days to receive a PIN in the mail	• A 3rd party user (*with the business' permission)* can establish a relationship or (self-delegate) to a business • The delegation process requires less steps due to enhanced shared secret authentication and elimination of sending the one-time access code via paper mail

There is a simplified process for establishing a relationship to a business. ***The first time a user established their first relationship to a business, the user is emailed a one-time access code.*** Going forward, that user will not have to enter an access code if and when establishing a relationship to another business. Anytime a user establishes a relationship to a business, a ***User Role*** must be selected. See ***Learning Series 2*** for more information on established a relationship to a business.

User Roles:

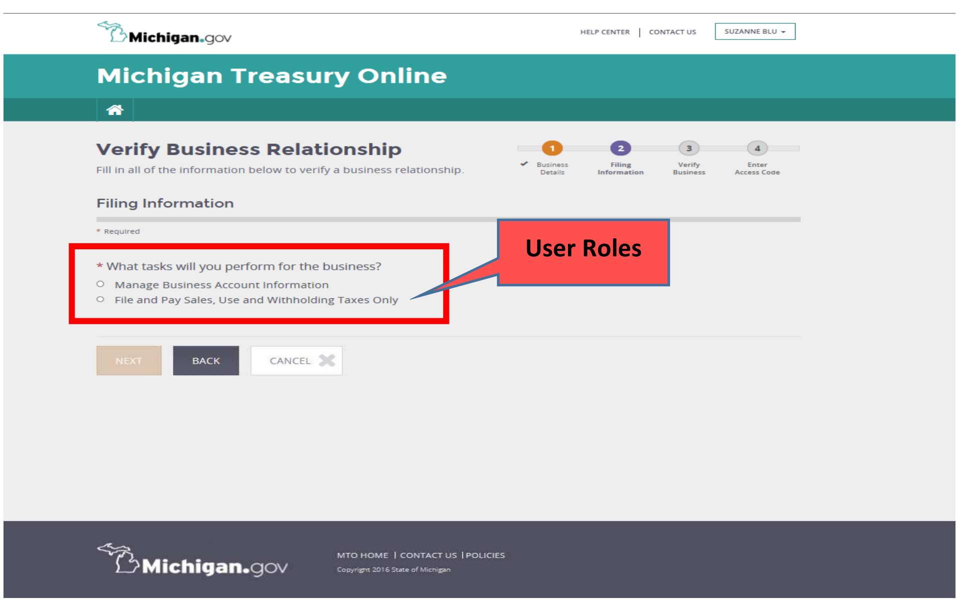
Manage Business Account Information – full manage rights that includes Registration functions and File and Pay SUW return functions. This role allows a user to add and update registration information along with the ability to file, pay, amend, view and previously filed returns.

File and Pay Sales, Use and Withholding Taxes Only – this role allows a user to file, pay, amend print and view current and previously filed SUW tax returns.

Fast File Now – a business relationship is not established therefore shared secret questions are not answered and an access code is not received when a user selects to user Fast File Now.

This is a guest access where not business relationship is established. With Fast File Now, there are limited capabilities; the user is restricted to simply filing and paying a Sales, Use and Withholding tax return. The user is not able to amend, view or print returns.

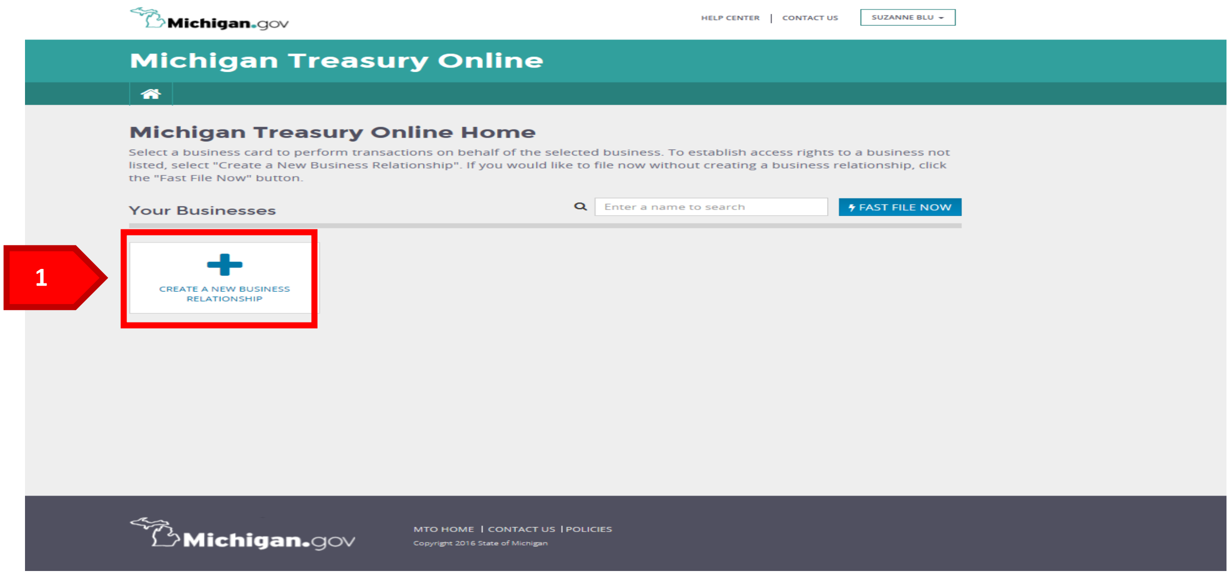
When establishing a relationship to a business, a user has two roles from which to chose.



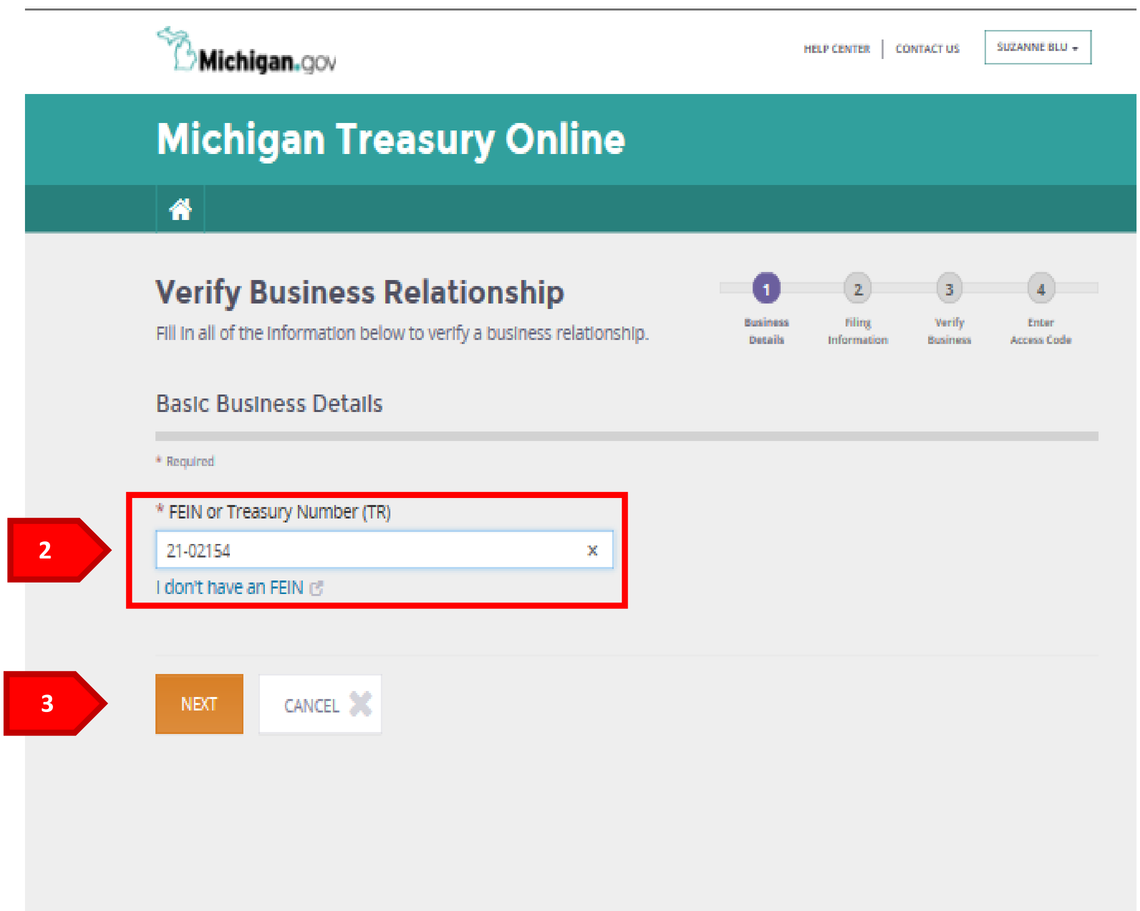
Selecting a User Role When Establishing a Business Relationship:

User Roles have a direct connection to a business relationship and influence the transactions the user can perform for the business. For example, if a user has 5 different businesses added to his/her profile (meaning they have established a relationship with each business), the user may have a different user role for each business.

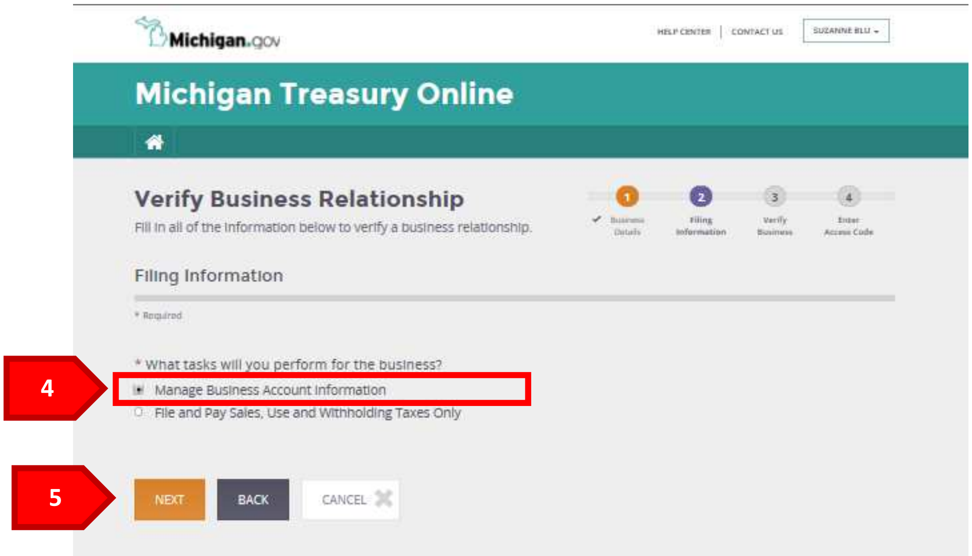
1. Select the **CREATE A NEW BUSINESS RELATIONSHIP** business card on the MTO home page.



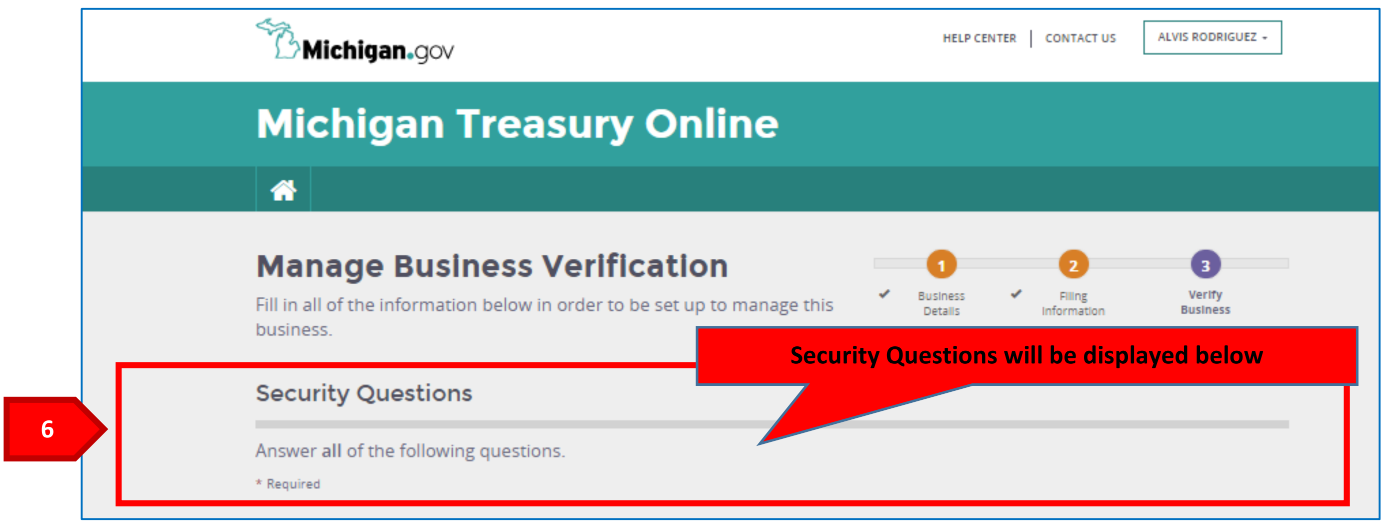
2. Enter the **FEIN** or **Treasury Number** of the business.
3. Select the **Next** button.



4. Select the **User Role** based on the transactions you want to perform for the business. If Manage Business Account Information is selected, the user will have full access rights.
5. Select the **Next** button.

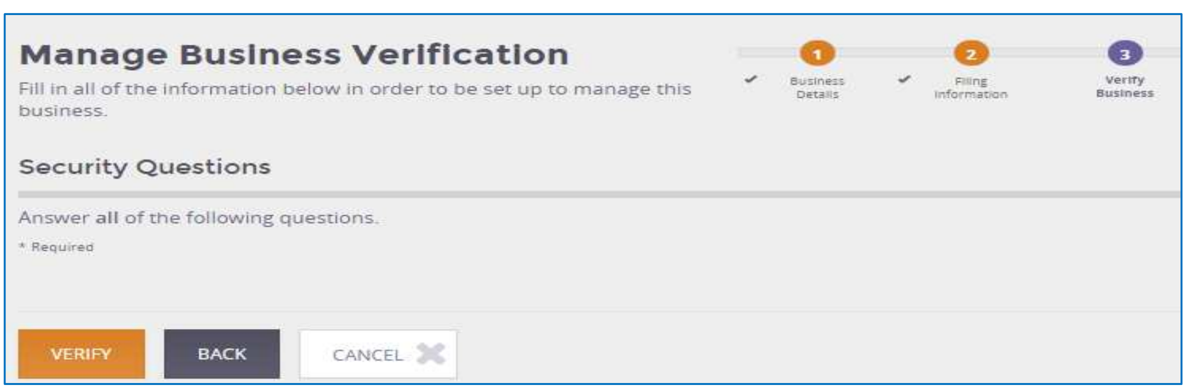


6. Answer the **Security Questions.**

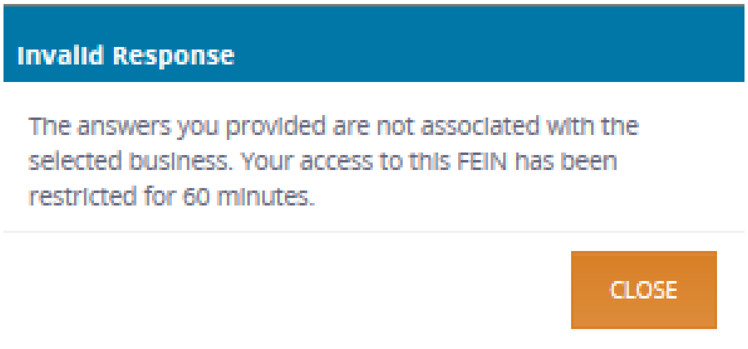


⚠ **Note:** *For security purposes, Verification Questions will not be shown in the Learning Series*

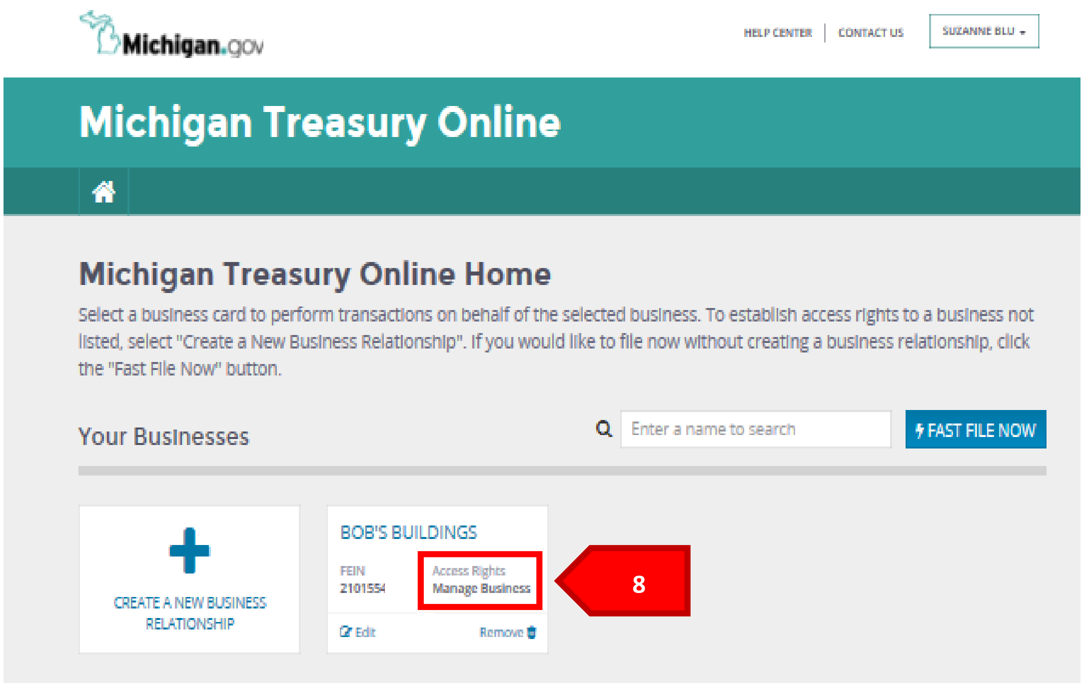
7. Once the security questions have been answered, select **Verify.**



⚠ **Note:** *If your answers are invalid, you will be given this warning message before being locked out of the system for 60 minutes.*

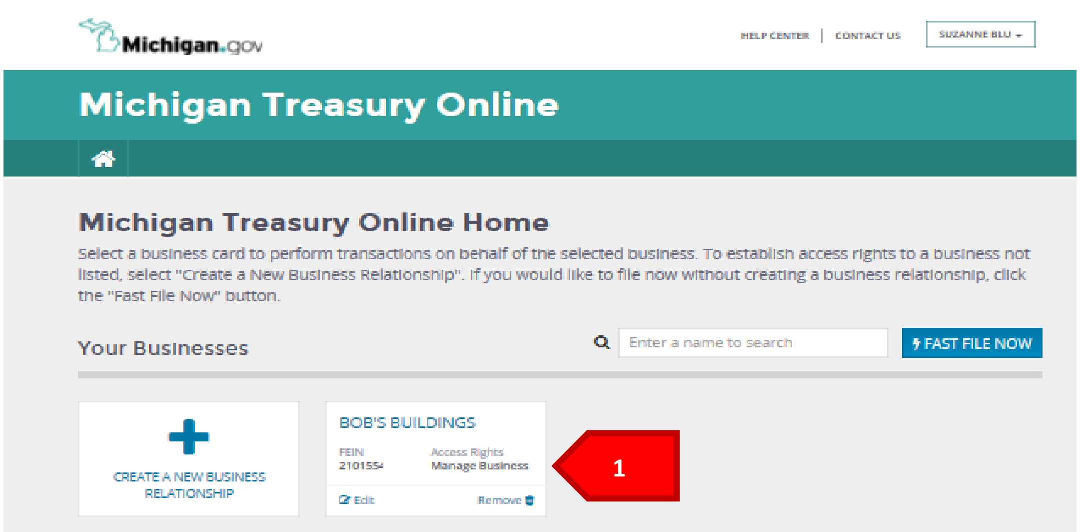


8. If all questions are answered correctly, you will see the new business listed on a business card on your MTO home page. The user's access rights (**Manage Business Account Information, for example)** is displayed on the business card.



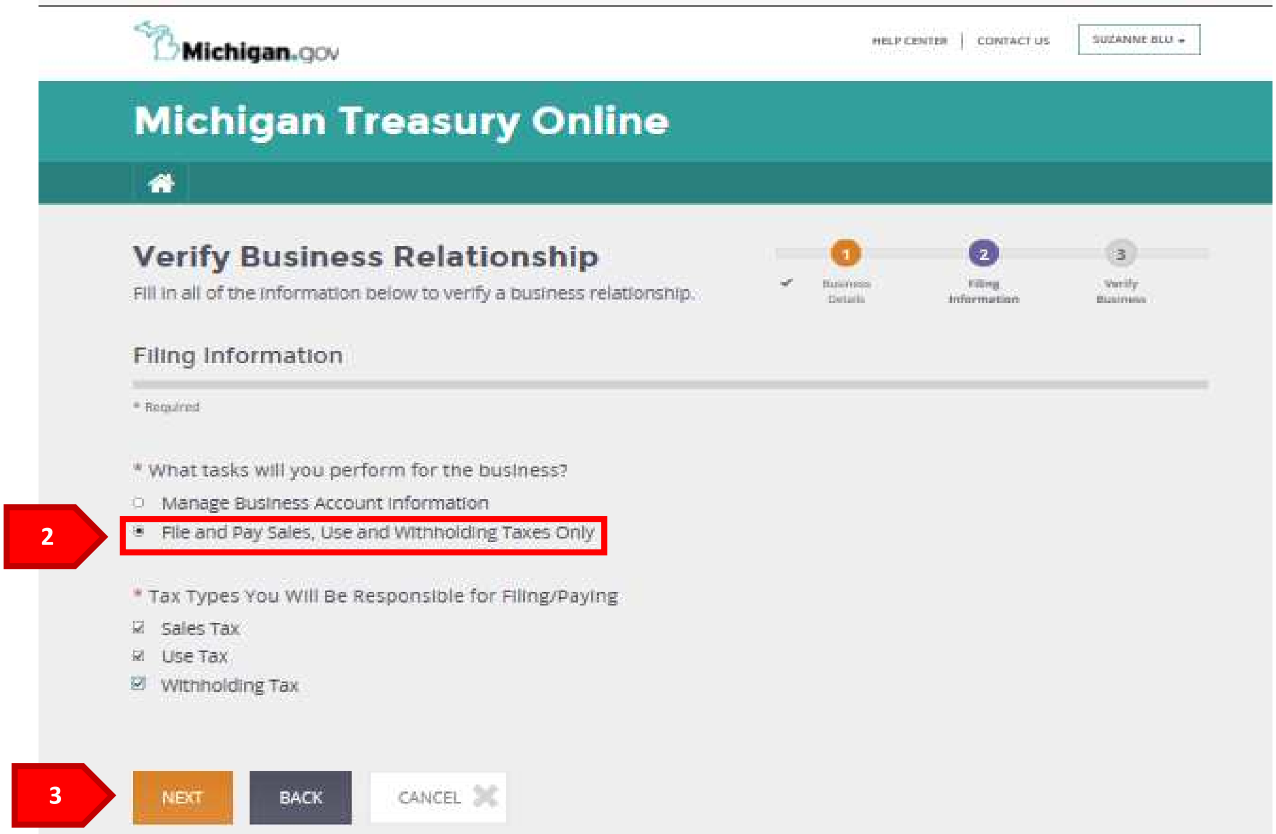
Edit a User Role for an existing business relationship:

1. Select **Edit** on the business card of the associated business

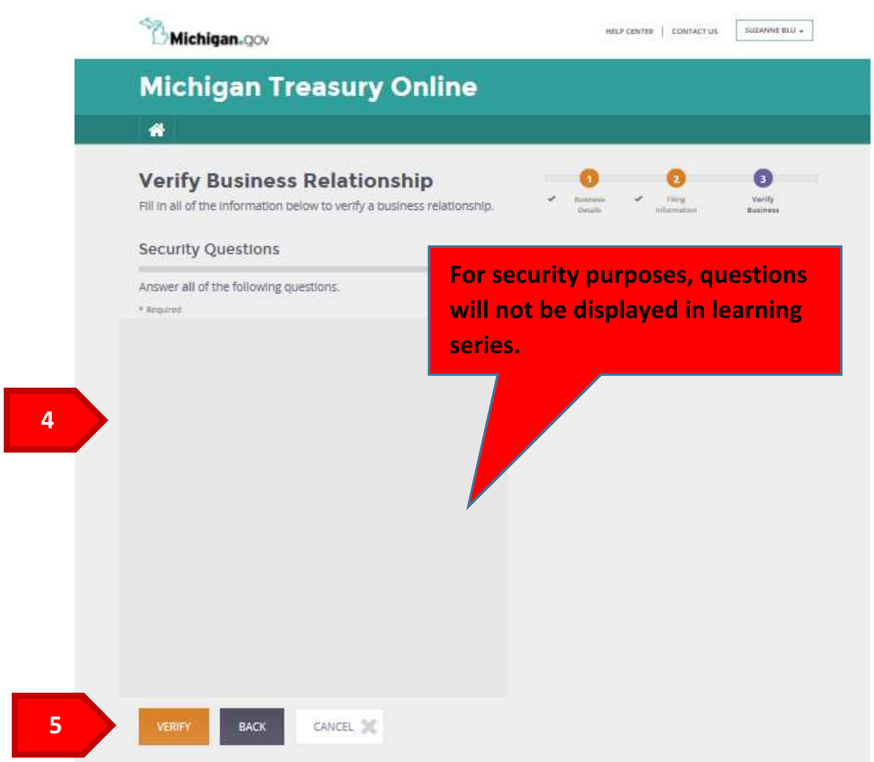


⚠ **Note:** *The user currently has "Manage Business" as the user role. Selecting "Edit" allows the user to change his/her role.*

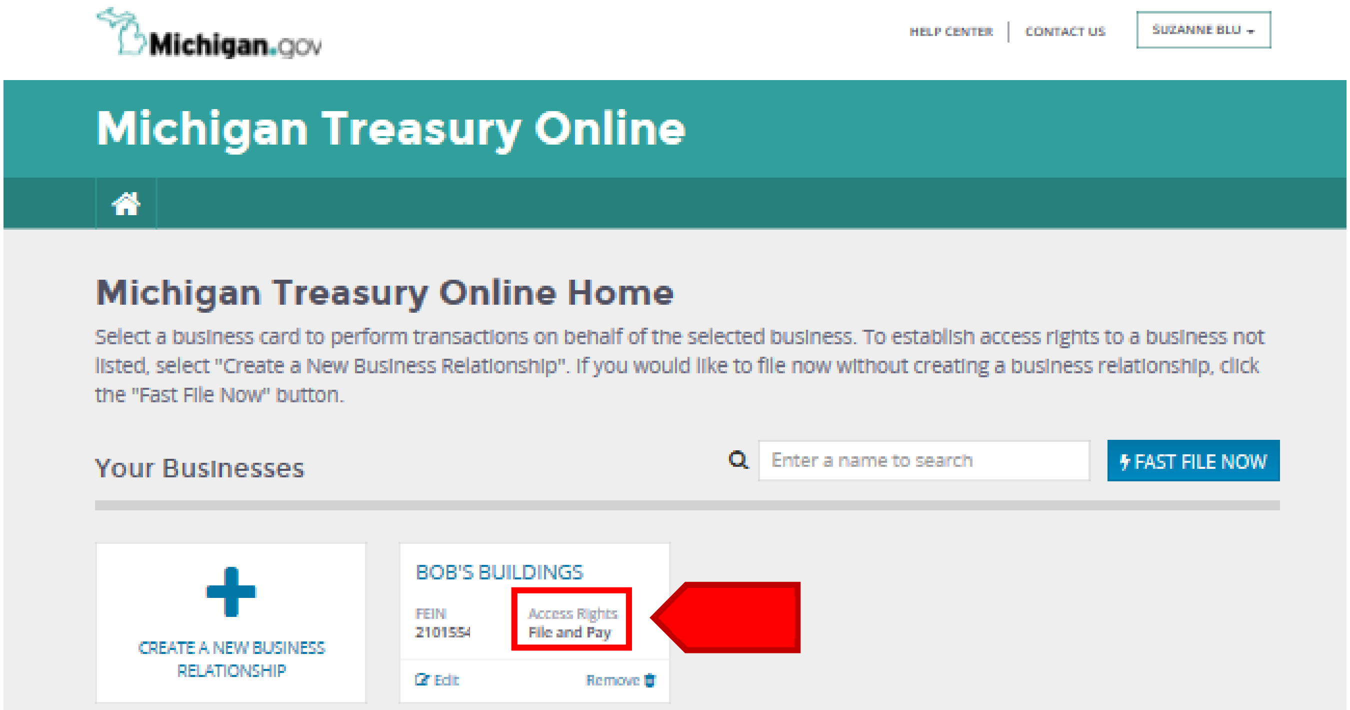
2. Select the desired user role and the taxes that will be filed (if the user role selected is File and Pay). In this example, the user wants **File and Pay – Sales Tax.**
3. Select the **Next** button.



4. Answer the **Security Questions.**
5. Select the **Verify** button.



6. The business card of the business will display the updated user role.



⚠**Note:** *The user now has "File and Pay" as their user role.*

Contact Us

If you have additional questions that were not answered using this Learning Series, please call the Michigan Department of Treasury at 517-636-6925.

The MTO Business website is currently being revised to include updated information on MTO and the changes to SUW that will begin in January. The website can be accessed here: www.michigan.gov/mtobusiness.